BANQUE PRIVÉE
EDMOND DE ROTHSCHILD
GENÈVE

GROUPE
LCF ROTHSCHILD

Solving Reporting and Analytic Requirements at Banque Privée Edmond de Rothschild with Informatica

"Our business managers will continue to reap real benefits with the timely delivery of accurate reports and analytics to senior management and regulatory bodies alike. These activities are being performed within hours rather than days and the IT department can get on with its planned projects instead of being distracted by generating one-off reports."

—Terence Denton, IT Manager, Edmond de Rothschild

CHALLENGE

Integrating data across eight different relational and non-relational systems that contained nearly 3 terabytes of data

INFORMATICA SOLUTION
• Informatica PowerCenter®

BENEFITS
• Improved operational efficiency
• Quicker, more cost effective development
• Ease of use and maintenance

NUTS AND BOLTS
• Data Integration: Informatica PowerCenter
• Sources: Oracle, DB2, Sybase, flat files
• Target: Oracle
• Platform: Sun Solaris

Banque Privée Edmond de Rothschild is one of Switzerland's most esteemed private banks, and one of 15 members of the Swiss Stock Exchange. The bank strives to maintain the highest standards, not only in its dedication to private banking, but also in ensuring a quality service throughout its business. Its focus on clients' interests, professionalism, flexibility, business acumen, and coherent strategies are underpinned by a state-of-the-art IT infrastructure.

The Challenge

Each department within Banque Privée Edmond de Rothschild requires accurate information to meet the increasing demands from management and regulators alike. The added pressure of meeting these demands has increased tremendously over the past few years, and the need for reliable and timely information is absolutely paramount.

According to Terence Denton, Edmond de Rothschild's IT Manager, "In today's hectic business world, business users are constantly being bombarded with requests for information from management and regulatory bodies. More often than not, they turn to the already heavily loaded IT department for help in providing it."

In 1999 the integrated banking system was based solely on an IMS database. Although this was an immensely rich data information base, the tools to mine that data effectively were practically nonexistent. To help unit managers make decisions rapidly and to take pressure off the IT staff, the bank decided to build a data warehouse. Denton believes the company's data warehouse strategy, with its business-oriented data marts, provides business users with greater independence to, for instance, create custom reporting.

The Solution

Edmond de Rothschild decided a reliable replication engine was crucial to the viability of the data warehouse project, but the new technology also had to work within the bank's heterogeneous database environment.

After investigating various options, Denton's team discovered Informatica PowerExchange for IMS. The team was confident the product matched their search criteria. The bank had previously decided to build its data warehouse on an Oracle database with a Sun Microsystems hardware platform using Informatica PowerCenter to manage the data mart, and BRIO as the query and navigation tool. The Changed Data Capture (CDC) component was the "final piece of the jigsaw puzzle."

Why Informatica

Keeping the content of the data marts reliably up to date across multiple business areas is a top priority at Edmond de Rothschild. Using Informatica, the bank manages the integration of changed data on its mainframe operational databases.

The bank was able to quickly deploy several data marts with immediate, measurable benefits in two crucial areas—user accessibility and rapid information retrieval. Informatica PowerExchange for IMS is critical to the data marts' success, because after an initial load of data it sends only updated data from the IMS database and only from those segments specified—contributing greatly to the timely delivery of data.

"This facility was exactly what we required," says Denton, "and it is useful to be able to choose between a batch or online replication delivery."

The Results

The bank has identified clear advantages since using Informatica. The new system now supports five independent businesses with 13 data marts representing different areas of the bank. "Requests for reports from compliance and finance to IT have become a thing of the past. Our discussions now revolve around expanding the data marts," says Denton. With data marts operating in each business area—including compliance, finance, and IT—the benefits are clear, with a positive effect on time, cost, and staff productivity.

Today the business managers consult the data mart to solve their reporting and analytical requirements before referring any requests to IT. They are empowered to be more independent, faster, accurate, and inventive. "Quite simply, they are better equipped to run their departments and focus on the real business issues," says Denton.

"I can see us enjoying an excellent relationship with Informatica for a good many years to come. Our business managers will continue to reap real benefits with the timely delivery of accurate reports and analytics to senior management and regulatory bodies alike. These activities are being performed within hours rather than days and the IT department can get on with its planned projects instead of being distracted by generating one-off reports."

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